

A SIMPLE TOOL FOR SHARING KNOWLEDGE AND EXPERIENCE

Notes for the Manager

Too often in state government, experienced and talented workers are only fully appreciated once they leave their positions. Only then do their coworkers and managers realize how much knowledge and expertise they used in their day-to-day work. The valuable information is lost when the employee walks out the door. Customers and coworkers suffer until the knowledge is replaced over time.

Ideally, capturing and sharing critical knowledge and expertise should be occurring continuously among employees. In many cases, however, it is not and this need becomes pressing when a valued employee is preparing to retire or change positions. Attached you will find a simple tool that can be used to capture some of that knowledge and experience before employees leave the organization. This is a tool designed for the employee to complete as they look back over their career and evaluate the impact of their departure. In addition, there are tools available for more in-depth management of knowledge and experience in your organization. Please contact a Governmental Service Center (GSC) consultant for more information.

Before using the attached tool, there are a few things to think about:

- Is the organization going to fill the vacant position or reassign the duties?
- Are all the duties of the position still important to the mission of the organization?
- Is there a need to update the job description for the position?
- Will the position change, remain as is, or be eliminated once the employee leaves?

By having the employee complete the attached tool, data can be collected as to the tasks and activities that are currently being accomplished. The knowledge transfer plan allows you, along with the employee, to target the knowledge and expertise that should be shared with the remaining staff. It also allows the evaluation of the criticality of the task to the overall mission of the organization.

In addition, we have found that completing the tool provides a positive framework for the departing employee to look back over their career and document their accomplishments and worth to the organization. It also provides a mechanism for the employee to give honest feedback on the necessity of actual tasks and activities. Please feel free to adapt and use this tool as necessary within your organization. It is provided to be a starting point for sharing knowledge and experience, allowing those who remain with the organization to continue providing quality service.

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HOW TO CONTINUE GOOD WORK WHEN EMPLOYEES CHANGE JOBS OR RETIRE

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Ideally, capturing and sharing critical knowledge and expertise should be occurring continuously among employees. In many cases, however, it is not and this need becomes pressing when a valued employee is preparing to retire or change positions.

This tool is designed to help you identify and capture the knowledge that is critical to the work you do so that others can access the experience that is valuable to your coworkers and your customers. Whether you are preparing to retire or are simply looking for a way to share what you know, this tool will help you.

Instructions

There are three simple steps to complete the worksheet:

1. Identify critical tasks and activities.
2. Define each task and activity.
3. Develop a knowledge transfer plan.

Set aside some quiet time to work through the steps. You may find it helpful to talk to coworkers and your manager as you answer the questions. Sometimes experienced employees don't realize how much they know. Others can help uncover the pieces.

The worksheets begin on the next page. Feel free to adapt it as necessary to meet your organization's needs.

STEP 1: IDENTIFYING CRITICAL TASKS AND ACTIVITIES

There are probably some aspects of your work that only you know how to do. In this step you are developing a list of those tasks and activities. It isn't necessary to go into detail. Let the questions below stimulate your thinking:

- What are you known for? What are you the “go to” person for?
- What do only you know how to do?
- If you left your position today, what wouldn't get done because no one else knows how to do it or what to do?
- When you return from a vacation, what work is usually waiting for you because no one else knows how to do it?
- When you have to be away from work, what do you worry about (what work isn't getting done or what work isn't being done well)?
- What does your office rely on you for?

List the tasks and activities below, using as many blanks as necessary.

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____

Examples:

1. **Customer complaints are not addressed.** (Addressing customer complaints)
2. **New initiatives lay on your desk until you return.** (Developing new business processes)
3. **Special requests are not processed.** (Processing special request forms)
4. **Computer glitches are not fixed.** (Solving computer glitches)

STEP 2: DEFINE EACH TASK AND ACTIVITY

Complete this worksheet on **each** task or activity identified in Step 1. You will be identifying in more detail the essence of the knowledge and experience required to complete each task or activity. It is not necessary to inventory all your knowledge and experience. You are simply defining the particular task/activity in more detail. What information or experience do you have to have in order to carry out this responsibility or task? Focus especially on things only you know and that others need to learn.

Consider these areas to get you started:

- Knowing key contacts (customers, universities, other state agencies, etc.)
- Having strong relationships with key customers or coworkers
- Knowing logistics or locations (training rooms, field offices, etc.)
- Knowing past history (court cases, customer requests, business decisions, etc.)
- Knowing locations of critical files or information
- Knowing how to carry out a task or responsibility

There are many other areas. Think through the steps necessary to complete the task and work to uncover the parts that are critical to your success. What do you know that others need to learn from you in order to be able to serve your customers as well as you do?

Example

Task or Activity (from step 1):

Special request's are not processed

List the critical knowledge, experience, or skill needed for this task:

- 1. Knowing how to enter special requests into the computer system**
- 2. Knowing how to assign special requests, based on each person's experience**
- 3. Knowing which information to ask customers for when they make a special request**
- 4. Knowing the history of a customer's special requests, and being able to judge what their true need is**

CRITICAL KNOWLEDGE AND EXPERIENCE WORKSHEET

Task or Activity (from step 1):

List the critical knowledge, experience, or skill needed for this task:

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STEP 3: DEVELOPING A KNOWLEDGE TRANSFER PLAN

Fill in the matrix below. Start by inserting all the critical tasks and activities you identified in Step 1. Answer the questions in the chart for each area. Use the detail you developed in Step 2 to help you think about the questions.

Complete the matrix with your manager. When working closely in an area, it is sometimes hard to judge the importance and impact of the tasks on the organization. He or she will help you confirm your perception of the current importance, availability and impact on the organization.

For the tasks identified as critical, work with your manager to develop a strategy for addressing that area.

Example

Critical Tasks From Step 1 in the worksheet.	Importance Low-Medium-High Gauge the importance of the task identified	Availability Is this knowledge and expertise currently available from anyone else in our work area? Yes or No (if yes, who?)	Impact Low-Medium-High (If the task is important and there is no one else who possesses the knowledge, impact is high.)	Resources What resources (files, people, web sites, references, etc.) exist to help others learn this task?	Strategy How do you plan to address this knowledge gap? Who will learn it? How and when?
Special requests aren't processed	High	No. Jane knows how to enter data, but the rest only I do.	High	Jane for database. My special request files for format of info needed.	Outline step-by-step process of handling special requests. Me – 7/31/03 Creating a matrix of each person's expertise to help with assignment of special requests. Me – 7/31/03

KNOWLEDGE TRANSFER PLAN WORKSHEET

[illegible]

PUTTING IT TO WORK

Managers can use the Knowledge Transfer Plan to mobilize a learning effort! Assign people to learn the tasks you identified as having high impact importance. Encourage one-on-one coaching. Gather small groups of employees who can learn together. Establish accountability for the learning and be sure to provide time for accomplishing the learning goals.

If you are struggling with the use of these tools, don't hesitate to call the Office of Government Training (564-8170). Consultants are available to help you strategize how to overcome the knowledge and experience loss in your organization.